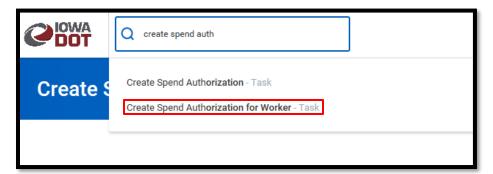## CREATE A SPEND AUTHORIZATION REQUEST

Spend authorizations are used to grant permission for future expenses. In our past system, this is what we called a Travel Request. This must be done <u>before</u> creating an Out of State Travel Expense Report.

From the **Search Bar**:

1. Search for and select **Create Spend Authorization for Worker**
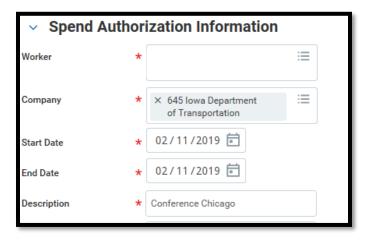

2. Fill in the **Worker** field with the name of the person who the spend authorization is for.

    <u>Note</u>: After you type in the name of the worker the page will reload with some instructional text. Just scroll to the bottom to continue working on the spend authorization.

3. Fill in the **Start** and **End Date (dates of travel)**, **Description**, **Spend Authorization Total**, and **Justification.**

4. Click the **Add Row** icon ⊕ to add spend authorization line item details.

5. Complete all required fields, **Expense Item** and **Total Amount**. In the Item Details section, remember to select **Hotel (if a lodging request)**, **Daily Rate** (this field may or may not show up), and **Destination.**

    <u>Note</u>: If the destination city cannot be found, please email DOT.WorkDay@iowadot.us. They will add the destination and you will be able to continue the process once the destination has been added.

Spend Authorization Lines | Attachments

⊕ Add
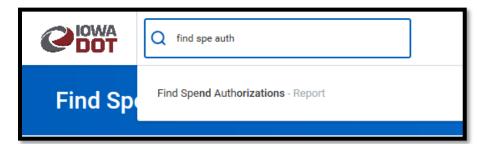
Click here to sort

Out-of-State Combined - 45.00 Meals

Out-of-State Lodging   400.00

Spend Authorization Line 🗑

Expense Item ＊ ✕ Out-of-State Lodging

Quantity ＊ 1

Per Unit Amount ＊ 400.00

Total Amount ＊ 400.00

Memo

Item Details

Hotel ✕ Aloft

Destination ＊ ✕ Chicago, Illinois, United States of America

Find Spend Authorizations

Company ＊ ✕ 645 Iowa Department of Transportation

Spend Authorization Status

Spend Authorization Worker

Document Number

Spend Authorization Created by Worker

Spend Start Date On or After   11 / 17 / 2018

Spend Start Date On or Before   02 / 15 / 2019

Spend End Date On or After   MM / DD / YYYY

Spend End Date On or Before   MM / DD / YYYY

Created On or After   MM / DD / YYYY

Created On or Before   MM / DD / YYYY

Approved On or After   MM / DD / YYYY

Approved On or Before   MM / DD / YYYY

Filter Name

Manage Filters
0 Saved Filters   Save

OK   Cancel

6. Click **Submit**.

VIEW AN EXISTING SPEND AUTHORIZATION

From the **Search bar**:

1. Search for **Find Spend Authorizations**

find spe auth

Find Spend Authorizations - Report

Find Sp

2. Click **Find Spend Authorizations**

3. Fill in **Company**

4. Click the **Process History** tab to check the status of the spend authorization request.

5. You will then have various filters for searching. (see picture to the right)

6. After you filter the search, you will click **Ok.**

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